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ABSTRACT

Merging to e-mail is a process which can be used to help the instructor communicate with students. Two possible ways this process can be used in education are: to update students on their grades and to conduct research. This paper first discusses reasons for using e-mail in education and then goes on to describe how to create a merge to e-mail system. Discussion includes an overview of the system; creating the spreadsheet; creating the Word document; editing the document and inserting merge fields; merging the document; sending the document; and advanced features for targeting special groups. (AEF)

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# E-mail Merge: An Easy Way to Update Students on their Grades

by

Matthew Dirks

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

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***Paper available on-line:***
***http://star.ucc.nau.edu/~nauweb98/papers/dirks2.html***

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## Why Use Merge to E-mail in Education

Merging to e-mail is a process which can be used to help the instructor communicate with students. Instead of having to write individual e-mails to each student, this process allows the instructor to send each student their individual grades. Two possible ways this process can be used in education are: to update students on their grades and to conduct research. An example of a merge to e-mail to update students on their grades will be used to describe the process.

Mail merge is a process that combines two files to create a third. This same process is used to send most personalized junk mail. The way the process works is by creating a form letter with special fields which allows data to be inserted. With a spreadsheet containing the names of city council members, a form letter could be created to send the same message to each person, but with their name on it. The goal is to get the salutation to read "Dear Council Person Smith," without typing in the last name on each letter. Instead, a special code is inserted where the name will appear, "Dear Council Person <<name>>." The name field is automatically filled and the word processor creates a new unique document for each name in the spreadsheet. The same process can be used to e-mail students their grades, but instead of printing out the document, it will e-mailed to them.

### *Updating Students on Grades*

Merging to e-mail can be used to report grades to students, send reminders or send encouragement. The best way to do this is to create a spreadsheet in Excel and use it as a grade book. Once the grades are recorded in Excel, they can be merged in a Word document to send individual grades to the student. This system allows the instructor to be very specific about what information to send and who receives the information. When the Word document is merged, it creates a message in the out box of the Windows Messaging System. This provides the instructor an additional opportunity to review the merged documents before they are sent out.

### *Using Merge to E-mail for Research*

Merge to e-mail can be useful in research. In any research requiring multiple surveys, it becomes difficult to track who has returned which survey. In survey research, two or more surveys may need to be completed and some participants require multiple opportunities to complete each survey. In most situations, participants respond at their own rate. This system can help categorize the participants so they receive only the information they need according to their progress. With this system in place, participants can be asked to respond to the survey they are working on and additional copies of the survey can be sent automatically. This can save considerable amounts of time in comparison to writing unique e-mails and it helps avoid upsetting the participants by prompting them to complete a survey that has been returned.

In a recent research study, this process was used to track participant responses and ensure that all of the participants received the same information. The system used was almost identically to the grade book example below. Each participants' name, e-mail, and course information was entered into an Excel spreadsheet. An additional column was added to keep track of where they were in the research process. This column contained a numeric code which represented what the participant had returned. This column was used to send appropriate reminders to participants based on where they were in the process.

## How to Create a Merge to E-mail System

### *The System: An Overview*

The process of merging to e-mail requires several steps:

1. Creating the spreadsheet.
2. Creating the Word Document.
3. Starting the merge. (This is where Word communicates with Excel.)
4. Editing the document and inserting merge fields in it.
5. Merging the document.
6. Sending the document.

### *Disclaimer*

Throughout this paper, several Microsoft products are used. The reason these products are mentioned is because this process works with these products. I am not trying to sell software and I am sure there is other software on the market that will accomplish the same task. My intent is to ensure that the reader can successfully complete an e-mail merge. I have not researched any other software well enough to explain e-mail merging using that software.

This presentation is not going to be a comprehensive, step-by-step approach on how to complete a merge to e-mail. It is assumed the reader has some knowledge of Microsoft Word, Microsoft Excel, and has a computer that can easily connect to the Internet. This paper will not cover how to set-up Microsoft Windows Messaging, obtain an Internet account, or how to trouble shoot if the process does not work. Several technical issues may arise when trying this process for the first time. Some of the key technical areas that may cause problems have been flagged. Please try to obtain local computer support for any technical difficulties that are tied to your system (it can be very difficult providing computer support over the phone or on e-mail). I am happy to address any questions concerning the merge to e-mail process or how it can be used. My e-mail address is: med4333@garnet.acns.fsu.edu.

This concept was originally shared with me by Dr. Al Oosterhof of Florida State University. He has used the process extensively to communicate with both traditional and distance learning students. His paper on the topic can be accessed at: http://users.itsnet.com/~wolfman/resources.html

### *Creating the Spreadsheet*

The spreadsheet is used as the primary data organization tool. Students' names, scores, and e-mail addresses only need to be entered once if they are entered in the spreadsheet. A few key things to keep in mind when creating the spreadsheet are:

- Each column needs to have a header row describing what is included in that column.
- Create a separate column for each type of information to be reported.
- Columns can include text, numbers, or numeric codes.

### Sample Spreadsheet: Creating the Spreadsheet

This sample exercise will be used throughout the paper. The example is based on an instructor who is setting up an e-mail merge system for a new class.

1. Open Microsoft Excel
2. Type in 6 headings in the first row: name, e-mail, quiz 1, paper, test 1 and average.
3. Create 3 or 4 fictional students (with your e-mail address to test the system)[1].
4. Put the formula in to show the average score in the last column. [=AVERAGE(C2:E2)]
5. Save the Excel document with a name and in a location which can be remembered.
6. Exit Excel (When merging, Microsoft Word prefers if it can open Excel).

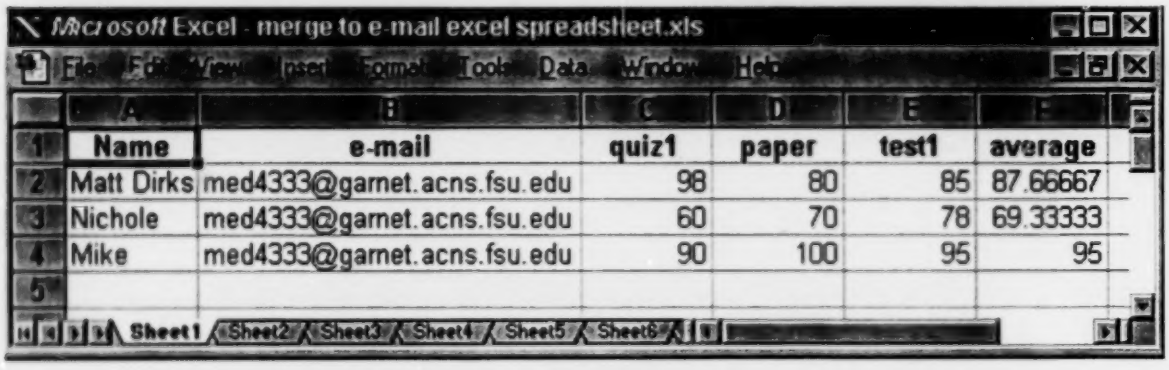
Microsoft Excel - merge to e-mail excel spreadsheet.xls
File Edit View Insert Format Tools Data Window Help
A B C D E F
1 Name e-mail quiz1 paper test1 average
2 Matt Dirks med4333@garnet.acns.fsu.edu 98 80 85 87.66667
3 Nichole med4333@garnet.acns.fsu.edu 60 70 78 69.33333
4 Mike med4333@garnet.acns.fsu.edu 90 100 95 95
5
Sheet1 Sheet2 Sheet3 Sheet4 Sheet5 Sheet6

**Figure 1: Sample Spreadsheet**

[1] Note in a real merge to e-mail document insert the actual students' e-mail addresses instead of your own.

### *Creating the Word Document*

The Word document creates the look and feel for a merge to e-mail letter. It indicates what information will be included, how the document will be formatted, and sets up the merge to e-mail. Some things to keep in mind:

- This document is being sent as an e-mail. Most e-mail programs do not have the capability to display fancy text or alignment. KEEP IT SIMPLE.
- Keep in mind this e-mail may go to the whole class. KEEP IT GENERIC.
- No one wants to read five pages of scrolling text. KEEP IT SHORT.

Sample Word Document: Setting up the merge

Follow the instructions below to create the basic merge to e-mail document.

1. Open Microsoft Word and a new blank document.
2. Type a subject on the first line and hit return.
   Ex.: Midterm Grade Update for Econ 111
3. Select "Tools," and then "Mail Merge."
4. In the pop up window, click on "Create" and then "Form letters."

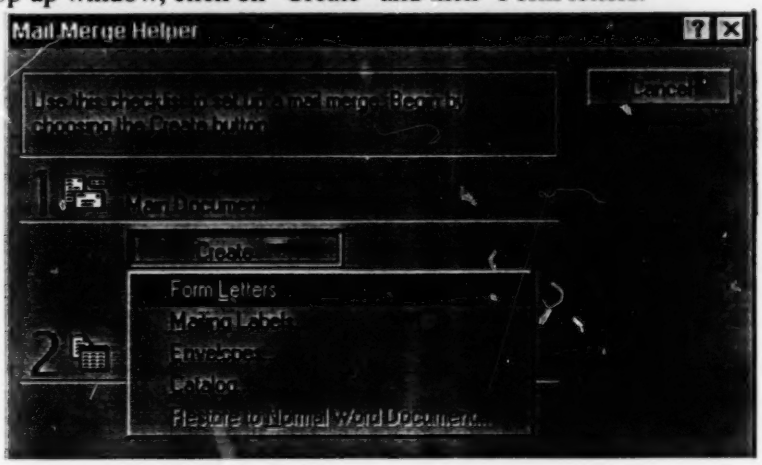


**Figure 2: Mail Merge Form Letters**

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5. In the pop up window, click on "Active Window" (this makes the current document the mail merge document, if " New Main Document" is selected a blank page will be used).

**Figure 3: Active Window**

6. Next select "Get Data", and choose "Open Data Source."

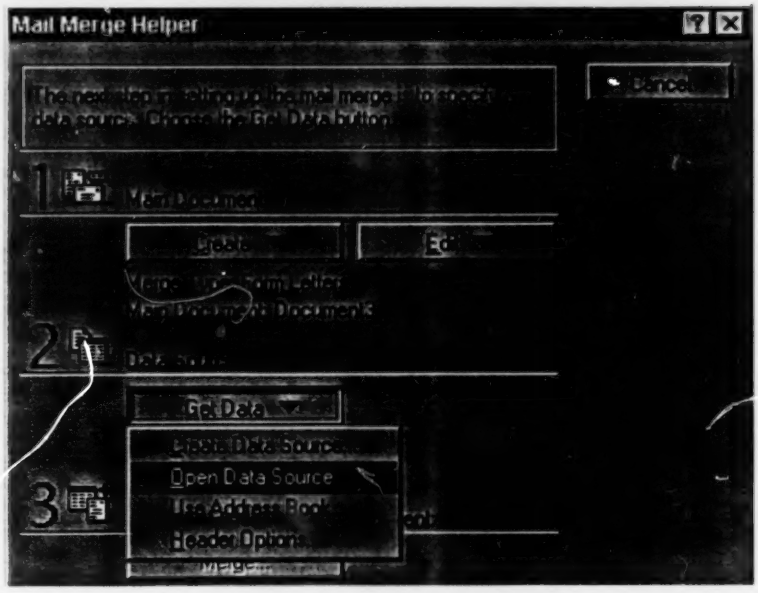


**Figure 4: Open Data Source**

7. Select the Excel file to be merged that contains the data (It may be necessary to change directories to find the Excel file).

| NOTE: Change "Files of type" to .xls or the spreadsheet will not appear. |
|---|

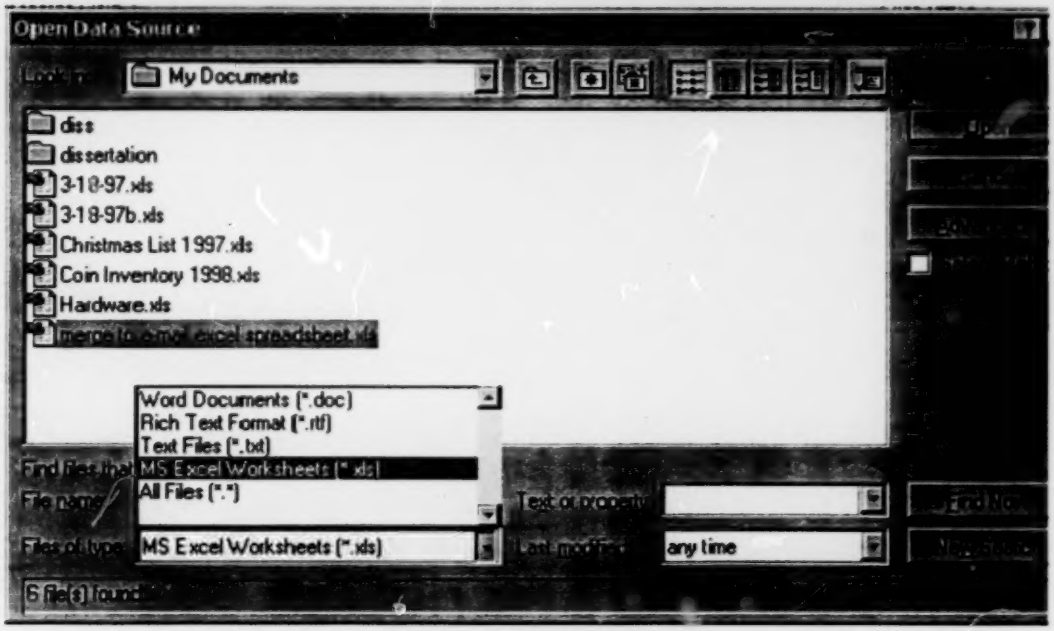


**Figure 5: Select File**

8. Once the file is selected, the computer will prompt: *Entire Spreadsheet*? Click on "OK."
9. The program will then prompt: *Found no merge fields.....* Click on "Edit Main Document."

### *Editing the Document and Inserting Merge Fields*

Okay, stop and breath. The computer was just told which file to use to obtain information. The directions seem a little tedious but it was necessary to illustrate the process and walk through some of the prompts. Now that Word knows about Excel, data fields from Excel can be inserted into the Word document. The Word document will show a new box in the upper left hand corner called: *Insert Merge Field.* Under this button, the column headings from the spreadsheet are listed. By clicking on the heading the data from that column can be inserted in the Word document.

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NOTE: Word can only merge with the first spreadsheet in Excel (sheet 1). If additional spreadsheets are needed, create new Excel documents.

## Sample Word Document: Editing the Document

This is where the actual text of the message will be created. Each instructor will have a unique message, but the example below illustrates how merge fields can be used in a document.

1. A few lines below the heading type "Hello," add a space, then click on "Insert Merge Field" and then "Name" and press return.
   The results should look like this: Hello «Name»
2. Press return a few times and type the main body of the message. (Everyone did very well on the first test and I look forward to receiving your papers next week.)
3. Provide a list of the grade information to be given to the students. Insert the Merge Fields the same way the name was inserted (follow the example below).

**Midterm Grade Update for Econ 111**

Hello «Name»,

Everyone did very well on the first test and I look forward to receiving your papers next week.

Here are your scores:

Quiz 1: «quiz1_»
Paper: «paper»
Test 1: «test1»

Average so far: «average»
Please let me know if any of these scores are incorrect.

**Figure 6: Sample text**

### *Merging the Document*

The next step will actually merge the two files. There are three options to do merges: new documents, e-mail or fax. At first, merge to a new document to view what is being created. Merging will take the form created in Word and insert the data contained in the Excel spreadsheet. For each record in the spreadsheet, a new document will be created.

Sample Word Document: Merging the Document

1. Click on "Tools," then "Mail Merge" and select "Merge."

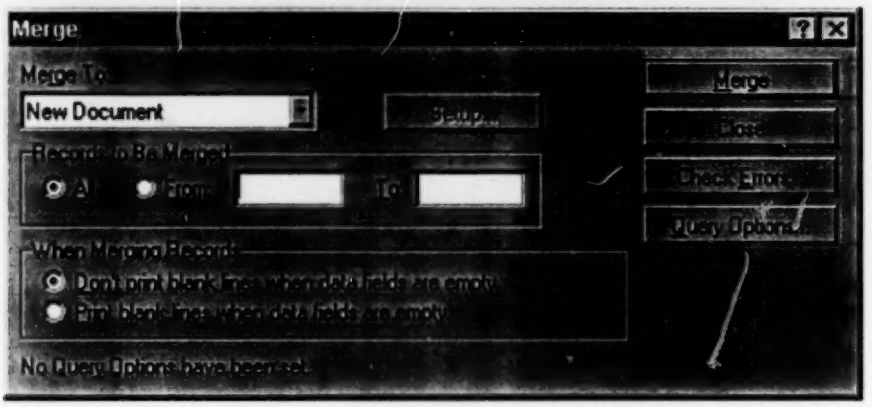


**Figure 7: Merge**

2. The first box indicates what will be merged to: New Document, Printer, E-mail or Fax. Set the program to merge to "New Document."[2]
3. Click on "Merge."
4. After merge is selected a new document will appear (Form Letters 1) which will show what the document would look like if it were going to be printed.

**Midterm Grade Update for Econ 111**

Hello Matt Dirks,

Everyone did very well on the first test and I look forward to receiving your papers next week.

Here are your scores:

| | |
|---|---|
| Quiz 1: | 98 |
| Paper: | 80 |
| Test 1: | 85 |

Average so far: 87.66666667

Please let me know if you think any of these numbers are incorrect.

[2] Word goes out and checks to see what is available to merge to. If the computer is not setup for fax or e-mail, those options will not be available.



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**Figure 8: Sample merge text**

5. All of the resulting documents are started on a new page. Review and edit the text until the document is correct.

> NOTE: The Merge document has to be the active document to repeat the merge. If things get strange, make sure you are not in a "Forms" document

6. Once the master document looks correct, SAVE IT.

## Sample Word Document: Merge to E-mail

1. To merge to e-mail, select "Tools," click on "Mail Merge" and "Merge." This time change the *Merge To* field to "Electronic Mail."

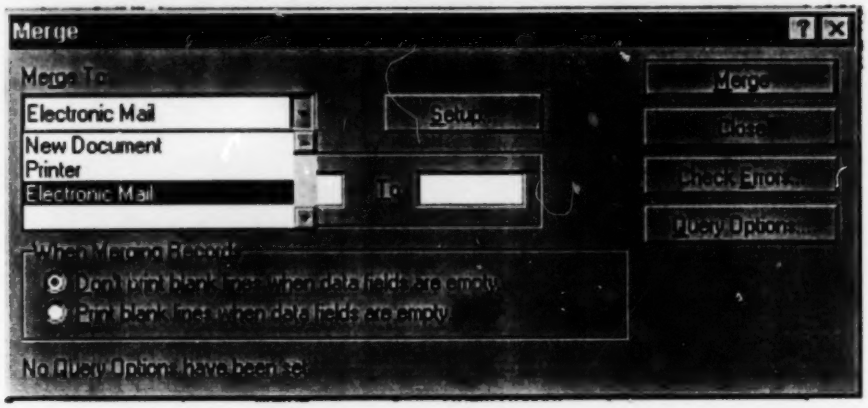


**Figure 9: Merge to e-mail**

2. From this window, select "Setup." In the first box, choose the field that contains the e-mail addresses. The second box is the subject line for the e-mail. After this information has been entered, click on "OK."

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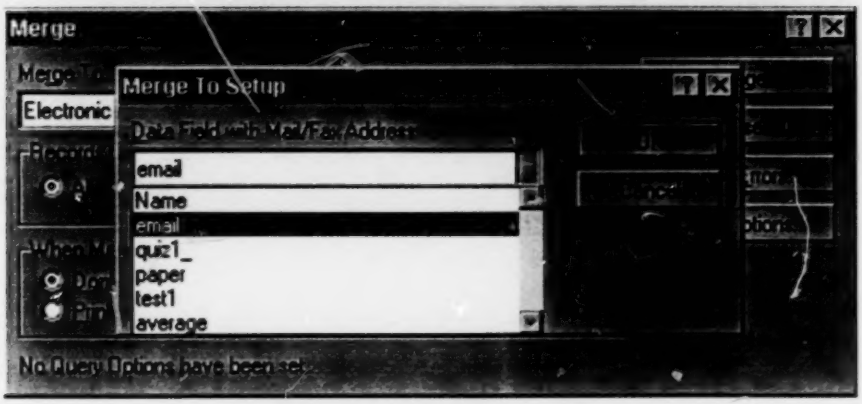


**Figure 10: Merge Setup**

3. From the merge screen. Click on "Merge."
4. The computer will then ask which profile it should use. Profiles indicate which connection settings will be used to connect to the Internet. Click on the appropriate profile.[3]
5. After the "Profile" is selected, Word will merge the document to Windows Messaging (or any other MAPI compliant e-mail program).[4] When it is finished merging, the finished documents will be in the Windows Messaging out box (assuming the computer is not setup to automatically send e-mail).
6. It may look like nothing happened, open Windows Messaging and go into the out box to see the e-mails. Double click on an e-mail to see the text and layout.

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[3] Admittedly, this is a lot of hand waving. I do not want to get into detail about how to setup Dial-up profiles or Windows Messaging. If Windows Messaging is functioning, this process will work.
[4] Windows Messaging is used in this paper because it comes with Windows 95, it is easy to setup, and it works.

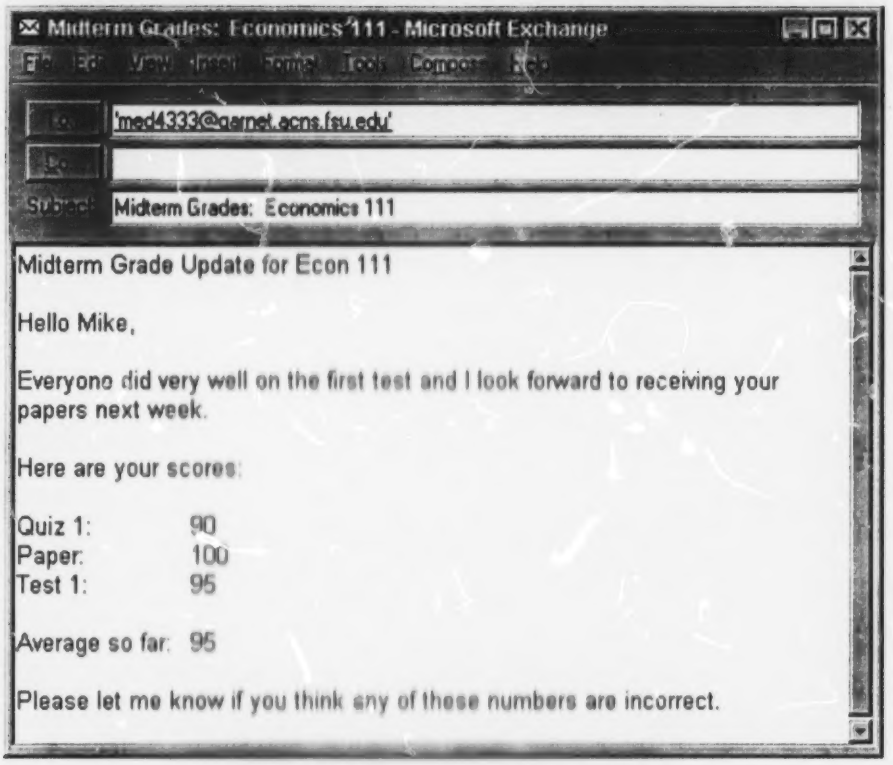
Midterm Grades: Economics 111 - Microsoft Exchange
'med4333@garnet.acns.fsu.edu'
Midterm Grades: Economics 111
Midterm Grade Update for Econ 111
Hello Mike,
Everyone did very well on the first test and I look forward to receiving your papers next week.
Here are your scores:
Quiz 1: 90
Paper: 100
Test 1: 95
Average so far: 95
Please let me know if you think any of these numbers are incorrect.

**Figure 11: Document to be e-mailed**

### *Send the Document*

Now send the document. Notice this document is different than the one created in Word. The title line is not bold or centered. If the document is acceptable, send it using the standard process usually used to send e-mail.

### *Advanced Features for Targeting Special Groups*

The previous section illustrated how to send e-mail to everyone on the spreadsheet. The following section will describe how to send e-mail to a specific group in the spreadsheet. This could be used to send e-mail just to students who received 90% or above on test, students who are getting 70% or less in the class, or students who are going to receive A's.

#### Sample Document: Setting Criteria

1. From the mail merge document in Word, click on "Tools," "Mail merge," and choose "Query options."

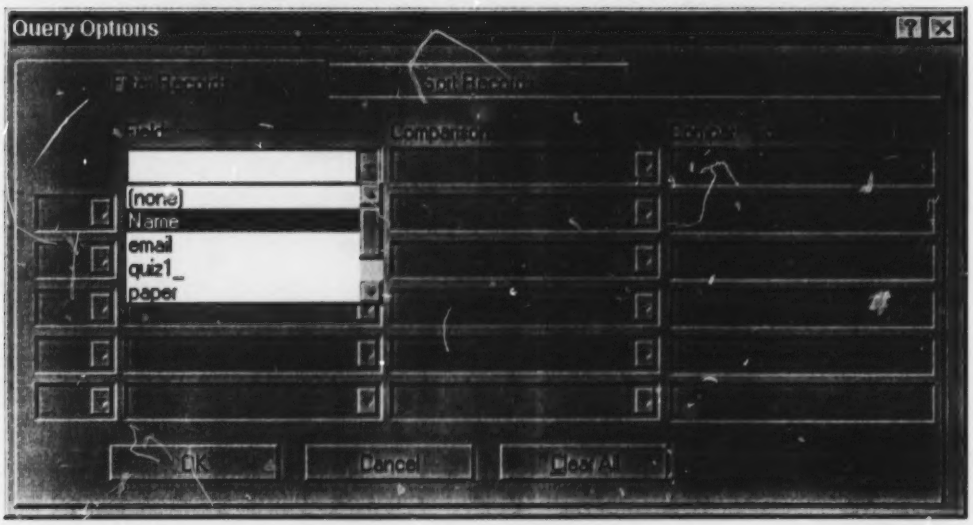


**Figure 12: Query Options**

2. Within the *Query Options* field go to the "Filter Records" tab. The first pull down option is "Field." "Field" is asking which field to use to filter the records. For this example, choose "average."

3. The next field is "Comparison." This indicates what kind of a decision to make about the field. The options are: Equal to, Not equal to, Less than, Greater than, Less than or Equal to, Greater than or Equal to, is blank, or is Not Blank. Choose "Less than or Equal to."

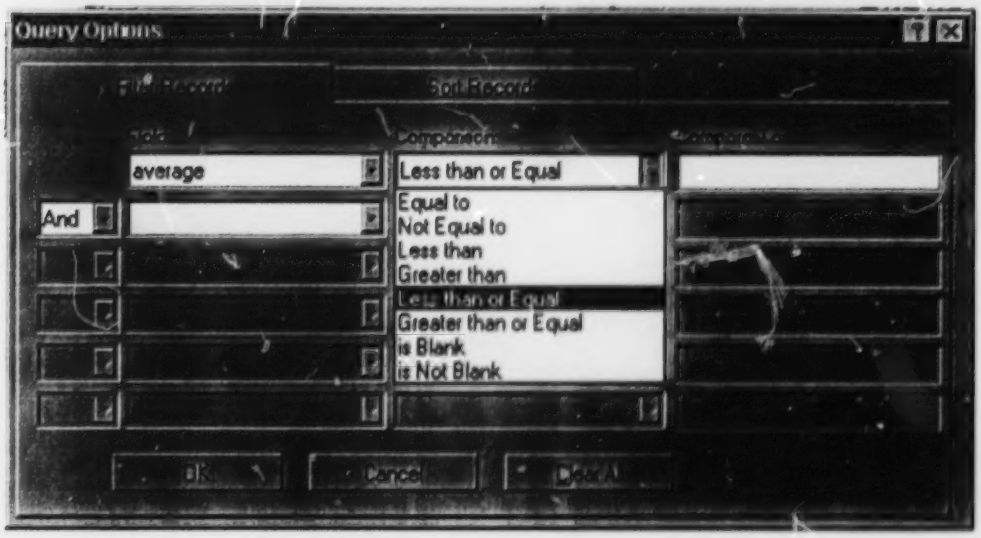


**Figure 13: Less than**

4. In the *Compared* to field, type in "70." This way, a message will be sent only to the students who are getting below a 70 in the class. Now the students who are not doing well can be given reminders, encouragement or additional feedback.

The *Comparisons* field allows e-mails to be sent based on specialized criteria. When merging with multiple specialized criteria, merge to a new document first to verify the correct document is being produced.

## Conclusion

This paper illustrates how to merge to e-mail. The process was described because it is believed that it can save instructors incredible amounts of time. With this system in place, students will be kept up-to-date without requiring additional time from the instructors. This can be done using the programs mentioned in this paper or with other similar programs.

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